

# Excel Template - Explanation of Fields

08/15/2023 5:22 pm EDT

<b>Constituent ID</b> -> The unique donor ID number or text that is assigned to your donor within your CRM	Fields in red are mandatory
<b>Greatest Gift</b> -> The largest dollar amount received from each donor	Fields in yellow are optional but will enhance the ask amounts
<b>Lifetime Giving</b> -> Total gift amount donors made to your organization over their lifetime of giving	
<b>Number Of Lifetime Gifts</b> -> Total <u>number</u> of gifts each donor made to your organization	
	Fields in green are the minimum requested data to create ask amounts
<b>Appeal Gifts Two Years Ago</b> -> Total dollar amount received or pledged that each donor made to your appeal two years ago	
<b>Appeal Gifts Three Years Ago</b> -> Total dollar amount received or pledged that each donor made to your appeal three years ago	
<b>Campaign Gifts</b> -> Total dollar amount received (if the capital campaign is completed) or pledged dollar amount (if capital campaign collection is in progress) that each donor made to your capital campaign (we recommend only adding this giving data if you had a capital campaign in the last 3-8 years)	Fields in yellow are optional but will enhance the ask amounts
<b>Special Event Gifts</b> -> Total dollar amount donors gave during a recent special event (for example, think of gifts received at your latest golf event or gala)	
<b>Wealth Rating – Minimum Suggested Ask</b> -> If you have conducted wealth research for your donors, this would generally be the minimum suggested ask amount (wealth research firms provide different types of data – the minimum ask amount might be located in an ask range or estimated capacity range)	
<b>Last Name</b>	Fields in purple are optional -> this is additional information you might use for your direct mailing
<b>First Name</b>	
<b>Spouse</b> -> first name of donor's spouse	
<b>Address1</b>	
<b>City</b>	
<b>State</b>	
<b>Zip</b>	
<b>Preferred Email</b>	
<b>Preferred Name</b>	
<b>Additional Fields 1-10</b> -> Any other records can be placed in these fields. These will not impact the ask amounts. You can add up to 15 additional fields.	